

# United States Bankruptcy Court for the District of Oregon

## ECF Version 3.1 Changes Mandatory Effective October 16, 2006

[Updated October 13, 2006; deletion shown in strikeout - see page 3]

The primary purpose of version 3.1 is to capture the statistical data required by Congress in the Bankruptcy Abuse Prevention and Consumer Protection Act. Changes and enhancements are summarized below.

- **PACER LOGIN**

The login screen has been changed to emphasize the differences between CM/ECF and PACER logins.

The Account Information link on the Pacer Service Center's website located at <http://pacer.psc.uscourts.gov>, can be used to specify the following:

- 1) to require/not require a client code;
- 2) define the format of the client code; and
- 3) show or suppress the display of the billing summary or receipt after each billable transaction.

Designation of a default PACER account causes the PACER login process to happen automatically when logging into CM/ECF; however, if a client code has been made mandatory for the default PACER account, the automatic login to PACER will not occur without the client code. If you have not typed a client code on the CM/ECF login screen, the PACER login screen will display when you run a report.

- **CASE OPENING**

### **Bankruptcy Cases**

#### **Form Changes (effective 10/16/06):**

Official Form #1 (petition), Official Form #5 (involuntary petition), and Schedules D, E, F, I, and J, and the Declaration Concerning Debtor's Schedules have been revised.

A new Exhibit D to the petition is required for every individual debtor; in a joint case, each spouse must complete and attach a separate Exhibit D.

Filing of both pages of Official Form #6, Summary of Schedules, is required for all individual debtors in chapters 7, 11, and 13. Other debtors must file only the first page.

The Certificate of Credit Counseling must continue to be separately docketed using the event Miscellaneous - Certificate of Credit Counseling or the designated field in the Case

Upload program.

Official Forms #22A, #22C, and #23 have also been revised.

### **Case Upload Changes:**

The format of the statistics record has been changed to include new fields required by BAPCPA. Therefore, attorneys must upgrade their petition preparation software at the same time the court upgrades to Version 3.1 (i.e., effective October 16, 2006). An attempt to open a case using a pre-Release 3.1 version of their petition preparation software will result in a CM/ECF error message that the case upload is rejected due to using an older version. Likewise, an attempt to upgrade the petition preparation software to be compatible with CM/ECF Release 3.1 before the court has upgraded to Release 3.1 will also result in an error message.

### **Open a BK Case Changes:**

New nature of business type, *Other*, has been added. “*Tax-Exempt Entity*” checkbox replaces “Nonprofit Organization” checkbox and can be selected in conjunction with any type of business.

Defaults for nature of debt, estimated number of creditors, estimated assets and estimated debts are now *blank* and *must* be selected. The values for estimated assets and estimated debts have changed. Previously there were 8 categories, now there are 5 *categories ranging from \$0 to greater than \$100 million*.

New field has been added to indicate whether there has been a prior *filing within the last 8 years*.

Chapter 7 cases default to no in the asset field. All other chapters now default to yes in the asset field.

New checkboxes were added for Chapter 11 cases to indicate if a plan is being filed with the petition and if acceptances of the plan were solicited pre-petition.

Case Opening will include fields for recording data on assets, liabilities, income and expenses from the *Summary of Schedules (Form 6)* and the *Statistical Summary of Certain Liabilities and Related Data (28 USC §159)* and Form 22A, 22B, or 22C as applicable.

### **Adversary proceedings**

Adversary case opening screen has changed to add the new field, *State Law*; choose yes or no. [Consult the Adversary Proceeding Cover Sheet if you are unsure how to complete this item.]

Nature of Suit codes have changed to a new two digit code replacing the traditional

codes. The new codes appear on the revised B104 Adversary Cover Sheet. Up to five nature of suits can now be selected.

A new mandatory field, *Role In Bankruptcy Case*, now appears on the screen for defendant/plaintiff party information to designate each party's role in the main Bankruptcy Case.

- **MISSING DOCUMENTS**

The Missing Documents event will include fields for recording data on assets, liabilities, income and expenses from the *Summary of Schedules (Form 6)* and the *Statistical Summary of Certain Liabilities and Related Data (28 USC §159)* and Form 22A, 22B, or 22C as applicable, to the extent this data was not entered at Case Opening. When entering statistical data in the Missing Documents event, be careful not to put any keystroke (for example, a leading blank) in any field for which the correct data was previously entered, as this will cause ECF to override that data.

- **AMENDED SCHEDULES**

Form #B6, the Summary of Schedules, will be required with every amendment to the schedules so that any updated total can be computed, entered, and verified.

- ~~• **CONVERSION DOCUMENTS**~~

~~Form #B6, the Summary of Schedules, will be required with any schedules so that any updated total can be computed, entered, and verified. When entering statistical data in the Conversion Documents event, be careful not to put any keystroke (for example, a leading blank) in any field for which the correct data was previously entered, as this will cause ECF to override that data.~~

- **CLAIMS**

Transfers of Claim should be filed using Form B210A. A "Notice of Transfer of Claim Other Than for Security" (B210B) is sent to the transferor when a transfer of claim event is docketed.

- **CREDITOR PROCESSING**

Additional checks are now being made to prevent bad data from being uploaded in the *Creditor Matrix*. Each line must begin with a letter, digit, or one of the following characters: # % & @.

- **NOTICE OF ELECTRONIC FILING (NEF)**

Previously, any recipient of an NEF was allowed one “free look” of the referenced documents and incurred no PACER charges. Now, **only** participants in the case (parties and attorneys) are given the “free look” while others will be billed.

Interested parties receiving email are now listed on the NEF (and in the “Mailing Information for a Case” utility) only if they are regular parties in the case.

- **NOTICES**

The correct return address for the debtor/plaintiff now appears in all notices.

- **QUERY**

When querying for a case and multiple cases match the query criteria, the date closed for each case is now displayed in addition to the date filed.

- **REPORTS**

A warning is now displayed for Case Reports, Claims Activity Reports and Docket Activity Reports stating they are not subject to the 30-page cap on PACER charges (the exception to the cap already existed but was not apparent).

Case Reports now show the old chapter for converted cases.

The Adversary Proceeding Docket Report now shows the chapter of the related bankruptcy case.

- **UTILITIES**

Mailings/Mailing Info for a Case: all attorney email recipients are now listed.

Court Information: A new utility that provides general court information such as the maximum size of PDF files and the court’s phone number. A link for this utility also appears on the CM/ECF welcome page.

- **MISCELLANEOUS**

If a case has been converted or dismissed, the appropriate labeled date is now displayed with the case number at the top of the docketing screen; this information is also shown elsewhere in ECF, such as on the Claims Register.

Many new prompts and questions have been added to existing events to capture data required by Congress in the Bankruptcy Abuse Prevention and Consumer Protection Act or by the Judicial Conference.

If you have any questions, please call the ECF Help Desk at:

Eugene (until 10/27/06): (541) 465-6448 x100

Eugene (effective 10/30/06): (541) 431-4005

Portland: (503) 326-1510

Toll Free (until 10/27/06): (866) 777-0442 x 100

Toll Free (effective 10/30/06): (866) 777-0442